

Job Aid:

How to Cancel Items in COMMBUYS

This Job Aid shows How to Cancel Goods and Services in COMMBUYS.

Of Special Note:

Before a receipt can be processed, there must be a PO in Sent status. The receiving of goods and services may be either: complete receipt or partial receipt. Items that are being returned must be received and then returned. The receipt of items can also be cancelled without first receiving them. This Job Aid shows how to cancel items on a PO and the completed receipt with a Receipt Number assigned in an updated status of Approved for Invoice.

Individuals within an agency or department who receive and or create requests for payments will find this document useful. These users **MUST** process receiving within the Basic Purchaser role or within the Department Access role with permission to receive.

Screenshot

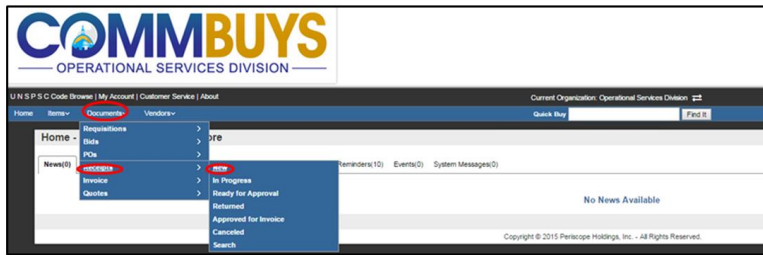


Directions

Step 1 Login to COMMBUYS

- Launch the COMMBUYS website by entering the URL for [COMMBUYS](https://www.commbuys.com) (<https://www.commbuys.com>) in the browser.
- Enter your Login ID and password and click the **Login** button on the COMMBUYS landing page.

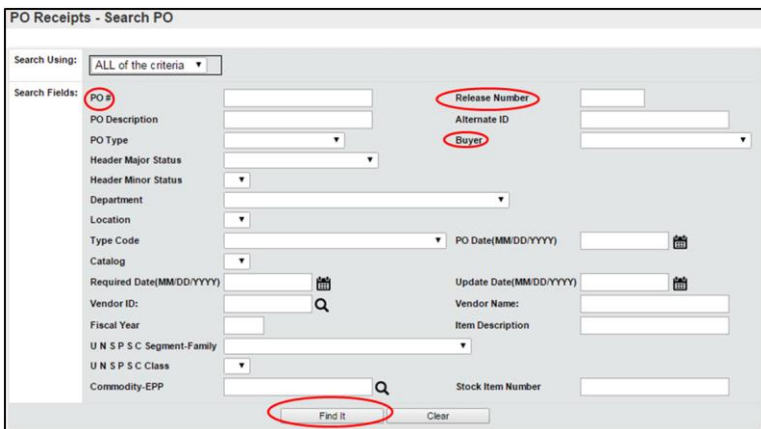
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Step 2 Create new receipt

- From the Navigation Bar, select the **Documents** dropdown tab, then click on **Receipts > New**.
- The PO Receipts-Search PO search box appears.

NOTE: The User must be in the Basic Purchaser role or Department Access with permission to receive.

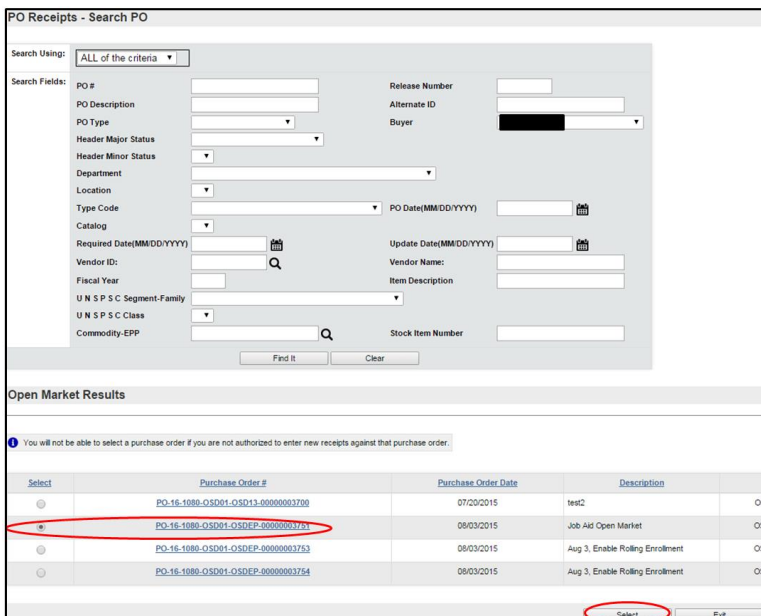


Step 3a Locate Purchase Order

Locate the Purchase Order by using any of the following search fields:

- Purchase Order (#) number and Release Number or Buyer.
- Click **Find It**.

NOTE: If you search using the Buyer field, the results will produce a list of the entire existing POs for the specified buyer. Select the required PO.



Select	Purchase Order #	Purchase Order Date	Description
<input type="radio"/>	PO-16-1888-OSD001-OSD13-00000003700	07/20/2015	test2
<input type="radio"/>	PO-16-1888-OSD001-OSDEP-00000003721	08/03/2015	Job Aid Open Market
<input type="radio"/>	PO-16-1888-OSD001-OSDEP-00000003753	08/03/2015	Aug 3, Enable Rolling Enrollment
<input type="radio"/>	PO-16-1888-OSD001-OSDEP-00000003754	08/03/2015	Aug 3, Enable Rolling Enrollment

Step 3b Select Purchase Order

From the list of existing purchase orders, select the PO by clicking the corresponding **radio button** in the select column.

Click **Select**.

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Step 4 Cancel Receipt

The screen opens to the receiving screen. The Receipt Type column defaults to Receive.

- Select **Cancel** from the dropdown menu in the Receipt Type column.
- Enter the quantity to be cancelled in the **Quantity/Dollar** column.
- Enter the **comment/reason** for the cancellation.
- Click **Save and Continue**

In this example we cancelled all the items.

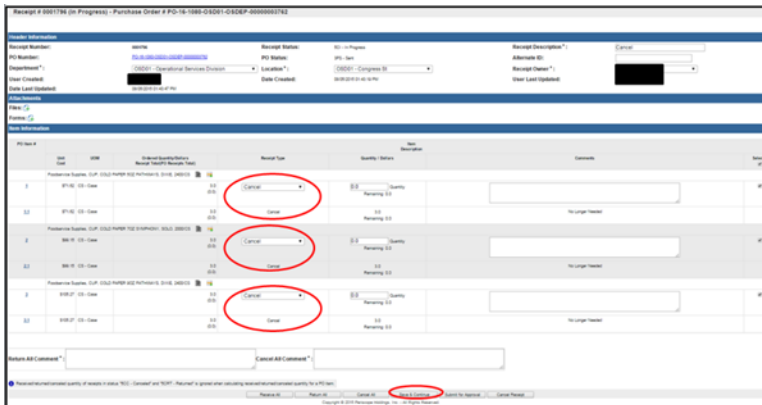
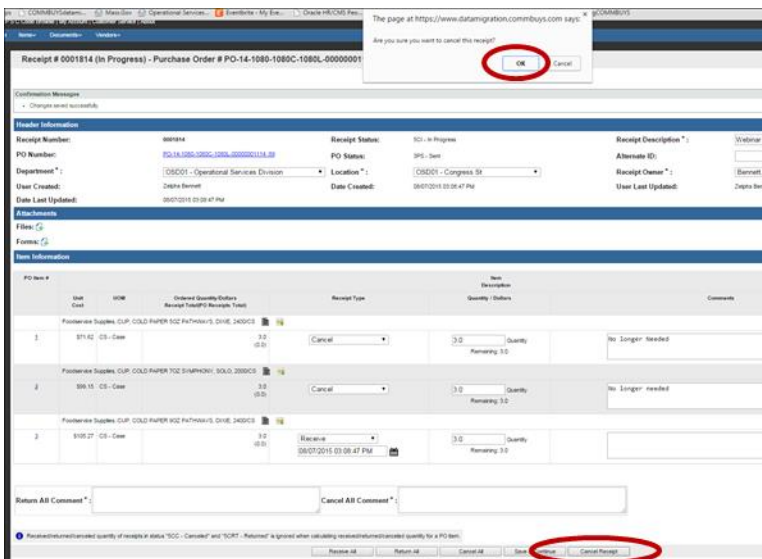
NOTE: Item do not have to be received before they can be cancelled.

Step 5 Cancel Receipt

- Click **Cancel Receipt**

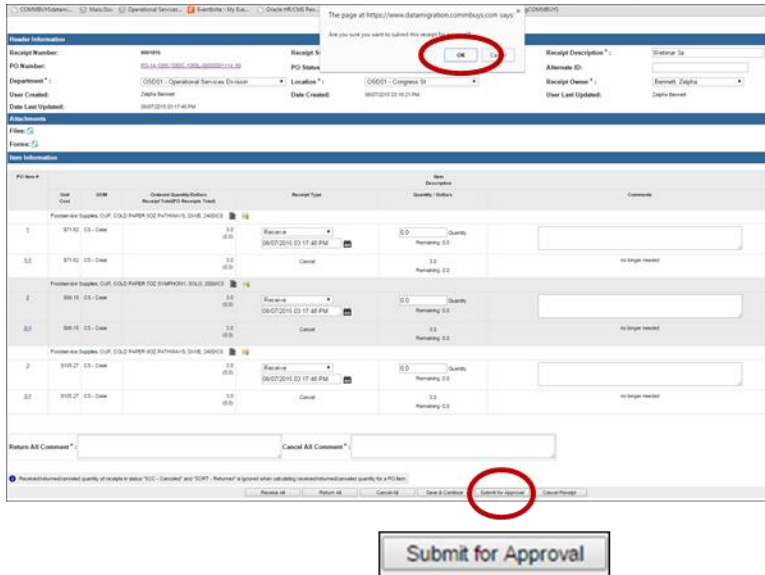
A dialogue box appears asking, "Are you sure you want to cancel this receipt?"

- Click **OK**, to confirm

Cancel Receipt

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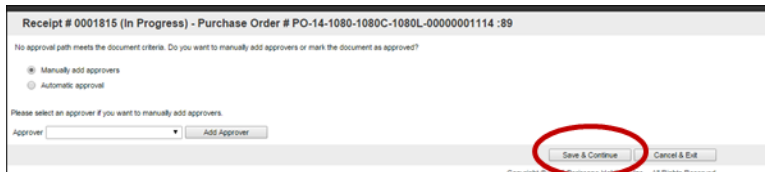
The screenshot shows the 'Cancel' dialog box in the COMMBUYS system. The 'OK' button is circled in red. Below the dialog box, the 'Submit for Approval' button is also circled in red.

Step 6 Submit Cancellation and Confirm

- Click **Submit for Approval**

A dialogue box appears asking, "Are you sure you want to submit this receipt for approval?"

- Click **OK, to confirm.**



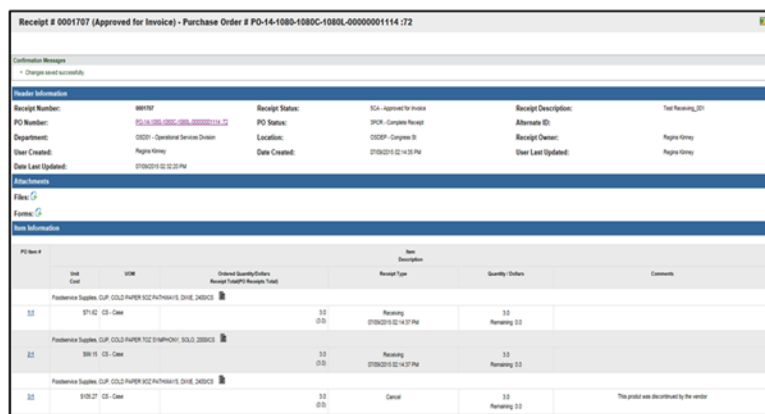
The screenshot shows the 'Receipt # 0001815 (In Progress) - Purchase Order # PO-14-1080-1080C-1080L-00000001114 :89' dialog box. The 'Save & Continue' button is circled in red.

Step 7 Submit for Approval

Each agency will set up their internal controls and the specific approval path for Receipts. Select the appropriate **Approval** choice.

- Click **Save and Continue**

The receipt will now be in Ready for Approval status until it is approved.



The screenshot shows the 'Receipt # 0001787 (Approved for Invoice) - Purchase Order # PO-14-1080-1080C-1080L-00000001114 :72' dialog box. The 'Approved for Invoice' status is highlighted.

Step 8

Once your receipt is approved, it will be placed into the **Approved for Invoice** status. Canceling items in a receipt initiates a Change Order to your Purchase Order.